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ABSTRACT

The Educational Services Office (ESO) of the Appalachia Educational Laboratory (AEL) sought an organizational strategy that would improve its ability to meet client demand without sacrificing the integrity of its programs or the fulfillment of its institutional responsibilities. Three alternative organizational strategies were identified: full-time assignment of staff to specific programs, a matrix management strategy (assigning staff by function across programs), and the state consultant model (assigning staff to specific states across programs). These three strategies were assessed using criteria extrapolated from a third-party survey of client preferences. These criteria included accessibility of staff, clear channels of communication, increased visibility of the laboratory, availability of on-site technical assistance, and expansion of information services. The state consultant model (SCM) emerged as the best strategy and was then assessed using internal office criteria derived from experience with a previous ESO organizational strategy. Based on this assessment, adaptations of the SCM were made. These adaptations included utilizing four data sources in matching states with available grants, appointing evaluators to monitor progress, and developing accountability procedures. These "mutual adaptations" are considered to be factors affecting the transportability of the model. Appended is a six-month state consultant plan for the ESO. (Author/JM)

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Factors Affecting the Transportability of the State Consultant Model to another Region: the Mutual Adaptation of the State Consultant Model and of the Structure of AEL's Educational Services Office

U.S. DEPARTMENT OF HEALTH, EDUCATION & WELFARE
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INTRODUCTION

AEL, a regional educational laboratory, has as its mission to improve education and educational opportunity for those who live in its primarily non-urban member-state region*. The Laboratory's goals for 1978-82, adopted by its Executive Board and reported in the AEL Plan for 1978-82 (AEL, 1977) are:

1. to institutionalize refined, systematic procedures for identifying and documenting educational problems of the region and for transmitting this information to the national R & D community, as well as to member states;

2. to institutionalize mechanisms for identifying R & D products potentially useful to solution of documented educational problems of the region and for communicating meaningful information about these products to each member state's educational community;

3. to systematically provide technical assistance and training based upon R & D precepts to ameliorate pressing educational problems or to adapt existing R & D products for solution of documented problems in educational practice of the region; and

4. to produce R & D products of national significance in the areas of early childhood and parenting, career guidance, experiential education, and others which may be identified.

The first three of these goals are addressed by the Laboratory's Educational Services Office (ESO). The fourth goal is currently addressed by the Laboratory's three R & D Divisions, each of which has multiple implementations of its products and programs across the country and each of which continues its R & D activity to further the profession's knowledge about how to improve equity and educational practice.

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*AEL member-states are Alabama, Kentucky, Ohio, Pennsylvania, Tennessee, Virginia and West Virginia. Through its Regional Exchange Project, AEL also provides selected services to Florida, Georgia, North Carolina and South Carolina. Except as noted, the activities discussed herein are funded by the National Institute of Education (NIE).

The topic of this paper is the selection and implementation of an organizational model for the ESO appropriate to AEL's first three goals. This Office, which is now in a staff relationship to the Laboratory Director's Office, has been expanded from 3.4 professional FTE in FY 77 to 9.55 professional FTE in FY 80. This near-tripling of ESO staff, which is equally attributable to conditions in the Laboratory's "long-term special institutional agreements" with its primary funding source (NIE) and to the policy of its corporate board of directors, has provided the impetus for the new organizational model.

ESO PROGRAMMATIC ACTIVITIES

In pursuit of the first three Laboratory goals, the ESO performs four sets of programmatic activities.

Needs Assessment and Problem Identification Program

Every third year, the ESO conducts a major assessment of the long-term and short-term educational needs of the member states. This assessment results in two R & D agendas: a short-term agenda reflecting prioritized educational problems amenable to R & D solutions in each of the member states as well as a prioritized list of R & D services member states desire AEL to provide; and a long-term, ten-year R & D agenda reflecting prioritized programmatic work deemed to be important to the region (Shively, 1980). The former agenda is germane to the first three AEL goals; the latter, to the fourth goal.

Regional Exchange Program

The Regional Exchange (Rx) links state education agencies (SEAs) of the member states and of Florida, Georgia, North Carolina and South Carolina with R & D resources appropriate to their dissemination needs, generally, and to basic skills needs, specifically. It also provides SEAs with supplemental

information search services and promotes collaboration between and among SEAs on staff development issues (AEL, 1979).

The AEL Regional Exchange also collaborates with six other Exchanges and four central support contractors which comprise the national Research and Development Exchange sponsored by NIE (FWLERD, 1979).

Regional Services Program

The Regional Services (RS) Program provides short-term (up to 18 months) R & D technical assistance to member-state SEAs in addressing salient problems amenable to R & D solutions. This technical assistance is defined as joint AEL/SEA projects. These projects are identified as an outcome of the AEL Needs Assessment and Problem Identification Project and, thus, vary considerably from state to state. For example, the most recent Ohio project was a survey of Ohio households' information sources about public education (McGeever, 1979) whereas the most recent Kentucky project was a guide for selecting appropriate primary and secondary remediation programs in reading and mathematics (Deay, 1979). In addition to these short-term projects, AEL's Regional Services Program also conducts an annual conference on a topic of regional concern and participates in collaborative enterprises with the other seven regional educational laboratories, with other regional educational agencies and with the nine national R & D centers.

Special Projects

Special Projects (SP) is an organizational umbrella covering many of the non-NIE contracts in which the Laboratory has involvement. Many of the SP contracts involve third-party evaluations; some are surveys of targeted populations; some are curriculum development or inservice training efforts. Most of the contracts are funded by SEAs. In addition to the obvious benefit of diversifying AEL's financial base, SP allows AEL: to attract persons with unique interests and skills into short-term involvements with the Laboratory;

to develop junior-level staff by involving them in projects different from the ESO's established programmatic work; and to enhance certain skills of senior level staff which may not be required in their work on ESO's established programs.

ADAPTING THE STRUCTURE OF THE ESO

Prior to ESO's full-staffing in 1980, the RS and SP functions of the Office were carried out by part-time staff assigned from AEL's R & D Divisions. Rx functions were carried out by 2.5 professional FTE assigned to the Rx program, only. While necessary and sufficient as an interim measure responsive to NIE's "program purchase policy" with regional laboratories and national R & D centers (as opposed to NIE's current policy of "special institutional agreements"), this organizational strategy was flawed with problems related to internal communication, coordination, program allegiance and supervision. These four problems are endemic to such "loosely coupled systems" as represented by the interim strategy (Weick, 1976 and 1979). It was ESO's intent to identify and implement an organizational strategy that minimized these problems, and that provided maximum administrative support to staff in the field, without "over-bureaucratizing" service delivery.

Criteria for Selecting a New ESO Organizational Strategy

A 1979 survey of Rx clients was conducted as part of an external evaluation of the AEL-Rx program. The Far West Laboratory for Educational Research and Development funded the evaluation. The evaluator's analysis of survey data provided criteria for the ESO to use in selecting a new organizational strategy (Bourexis, 1980):

(a) Accessability to AEL staff;
(b) Clearly understood channels of communication between SEAs and AEL;
(c) Increased visibility of AEL within SEAs;
(d) Availability of on-site technical assistance from AEL;
(e) Expansion of information services available from AEL.

Since the ESO is, by definition, the "field-responsive" arm of the Laboratory, these criteria were applied first to the following three organizational strategies being considered as alternatives to the interim strategy.

Full-time assignment of staff to specific ESO programs. Assigning ESO staff full-time to specific programs would not be desirable from the viewpoint of the clients. It would certainly multiply the channels of communications clients would be required to use to request services and would, therefore, minimize clients' access to staff and AEL's visibility within SEAs. Assignment of staff full-time to programs also would reduce the availability of technical assistance and would complicate the provision of information services to clients. Thus, while compelling from a program administration perspective, full-time assignment of staff to programs does not meet the clients' criteria, as extrapolated from the Rx external evaluation.

Matrix management strategy. Assigning staff across programs by function would not be desirable from the viewpoint of the clients. It would, first of all, be very difficult to explain to clients. It would require clients to adjust to a function structure as well as to a program structure. This would complicate communication channels, and minimize clients' access to staff and AEL's visibility within SEAs. Matrix management would, due to its complexity, reduce the availability of technical assistance and would delimit the provision of information services. Additionally, this strategy would require substantial adjustment in the administration of the ESO. Thus, a matrix management strategy falls short on most client-identified criteria and is not a viable alternative.

Assignment to specific states across the programs. Assigning staff first to specific states and second to programs is more responsive to client needs. However, it does pose some administrative problems. In this strategy,

the State Consultant Model (SCM), specific staff are assigned responsibility for delivering all four ESO programs' services in their respective states (Thompson, 1979). This strategy appears to meet clients' criteria. It provides the clearest communication channels between SEAs and AEL and maximizes access to AEL staff. It increases the visibility of AEL as well as on-site technical assistance. It also facilitates the delivery of AEL's expanded information services (see Zaltman, 1979).

The SCM strategy having successfully passed on the criteria extrapolated from the Rx client survey, was next subjected to internal ESO criteria, particularly the problem areas experienced with the interim strategy (see page four). A discussion of these internal ESO criteria follows.

Promote internal communication. Staff consensus was that the SCM strategy would promote and expedite internal communication. Staff persons would become immersed in and have ownership of the ESO activities in their assigned states. Their communication with each other and with supervisors would be as "experts on states X and Y" and would minimize the "pooling-of-ignorance" that attended the interim strategy. Internal rumors or media reports about particular states could be verified quickly by appropriate consultants because of the network of contact persons they would have developed in the particular states.

Coordination of service delivery. Staff agreed that since ESO programs are field-responsive endeavors, the SCM strategy would be appropriate for coordinating service-delivery. With the SCM strategy, the ESO would be organized by clients-served rather than by internal programmatic activities. The SCM implies, however, that ESO administration be particularly attentive to monitoring the initiation, coordination and completion of programmatic activities staff perform in the states; that staff assignments to states be made with careful attention to personalities, skills and interests of both

staff and clients; and that staff be brought together regularly for communication and training purposes.

Program allegiance. Staff recognized that the SCM strategy posed the opposite danger from program allegience, i.e., state allegiance. They recognized the very real danger of being co-opted by internal interests of their assigned states--to the detriment of ESO's programmatic activities. The importance of a new accountability structure and periodic staff meetings was underscored.

Supervision and administration. The staff sensed that supervision might prove to be the most critical variable in the successful adaptation and implementation of the SCM. Some of the more salient questions about the SCM strategy were:

(a) How does ESO match staff with SEAs to be served?
(b) How does ESO assure the availability of appropriate data for decision-making?
(c) How does ESO assure completion of programmatic scopes of work?
(d) How does ESO obviate the negative aspects of state allegiance?
(e) How does ESO handle the difference in service delivery between AEL member and non-member states?
(f) How does ESO evaluate the performance of field staff?

Subsequent paragraphs of this paper review AEL's responses to these adaptation and implementation questions as it operationalized the SCM strategy for the ESO.

ADAPTING AND OPERATIONALIZING THE SCM STRATEGY

Clearly, the SCM strategy was the most appropriate of those considered, given the criteria extrapolated from clients' concerns and those derived from ESO's experience with the interim strategy. Operationalizing the strategy, however, required careful preparation.

Matching Staff and States in the AEL Service Area

The ESO utilized four data sources in matching states with available staff: (1) prior AEL needs assessment data defining the short-term R & D agendas of member states; (2) the expertise, performance and prior experience of staff with RS, Rx and SP projects in client states; (3) preferences of clients and staff members; and (4) extant commitments of staff members. Two newly employed (1980) staff members were each assigned two of the four non-member states which receive only Rx-related services. More experienced staff were assigned to member states. One staff member was assigned three states; two others were assigned two each. Each "state consultant", as the staff members are called now, also were assigned as backup to another state consultant. Where data from the sources were in conflict, sources 2 and 3 were given more weight than 1 and 4. This weighting, a result of AEL's experience with member states, also is consistent with the literature on organizational change (see Daft and Becker, 1978; Nash and Culbertson, 1977; Baldridge and Deal, 1975; and Lawrence and Lorsch, 1969).

Programmatic Evaluation and Decision Making

Operationalizing the SCM strategy is not sufficient in and of itself to avoid "garbage can decision making," i.e., decisions made without clear goals and without clear technology (Weick, 1979). In fact, even with the structural safeguards previously described, i.e., the three AEL goals, the four ESO programs and the strong administrative support and information services available to the state consultants, there is still room for flex (positive) and for slippage (negative). ESO will utilize the services of a third-party evalutor to monitor progress toward achieving the goals and ESO administrators will monitor carefully the achievement of program milestones, the charges to program budgets and the feedback from clients in order to minimize problems and maximize opportunities. Even so, slippage

is possible. For example, a state consultant could become so enamored of a particular state's RS project, that Rx and SP program responsibilities in that state would be neglected.

Accountability for State Consultants

To protect against the slippage just described--or, stated more positively--to provide ESO administration with information about such situations, an accountability procedure has been developed. Using historical data from ESO's state files and on-site conversations with SEA officials, each state consultant developed a six-month plan for each state to be served. (Cf. discussions of evaluations and linkers in Bank, et. al., 1979). These plans included a profile of the state along with the names and titles of key clients within the SEA, and a charting of ESO program objectives by projected activities and outcomes. A sample plan is provided in the Appendix. Prior to the preparation of required quarterly reports in each ESO program area, interviews will be conducted with the state consultants to discuss progress in completing their respective state plans, resources expended, programmatic activities to be coordinated during the next quarter and possible amendments to state plans based on the experience of the last quarter. In essence, these state plans provide a management-by-objectives structure for the ESO and are "individualized educational programs" for each state served. Finally, one-half day each quarter will be set aside for the state consultants to meet to discuss needs, problems and opportunities across the AEL service region.

SUMMARY

The Educational Services Office (ESO) of AEL, Incorporated, a regional educational laboratory, sought to identify an organizational strategy that would improve its ability to meet client demand without sacrificing the integrity of its programs or the fulfillment of its institutional responsibilities.

Three alternative organizational strategies were identified. These three strategies were assessed using criteria extrapolated from a third-party survey of client preferences. This assessment resulted in the selection of the State Consultant Model (SCM) as the most-preferred strategy. The SCM was then assessed using internal Office criteria derived from experiences with a previous ESO organizational strategy. Based on this assessment, adaptations of the SCM were made. These "mutual adaptations" are described as necessary steps preceeding implementation of the Model as the new organizational strategy of the Office.

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APPENDIX

Sample Six-Month Plan Developed
By A State Consultant

State Consultant Plan -- Tennessee

January 1980 to June 1980

A Plan for the Delivery of Services and Accomplishment of the Goals of the Regional Exchange and Regional Services Programs of AEL, Inc.

Prepared by:

Merrill L. Meehan

January 28, 1980

Appalachia Educational Laboratory

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Charleston, West Virginia 25325
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State Consultant Plan -- Tennessee

Key Actors:

1. Lamar Alexander - Governor
2. Ed A. Cox - Commissioner of Education
3. Joel Shore - Assistant to the Commissioner
4. Howard McNeese - Deputy Commissioner
5. George Malo - Acting Director, Research and Evaluation (RS Advisory Committee Member)
6. Bobby Woodruff - Research and Evaluation Specialist
7. Jim Cannon - Director of Dissemination (Rx Advisory Committee Member)
8. Charles Moffett - Project Director, State Capacity Building Grant
9. Janice Shelby - (new) Assistant Commissioner, Division of Curriculum and Instruction

TN Rx-RS Objectives (1/28/80 - 6/30/80)

1.0: To conduct a minimum of two needs-sensing visits to Tennessee dissemination personnel

2.0: To provide technical assistance and training in dissemination and school improvement efforts to Tennessee educators

3.0: To involve Tennessee personnel in the planning and conducting of at least one regional and one "job-alike" workshop

4.0: To explain and, where applicable, distribute resources which assist in dissemination and school improvement efforts

5.0: To involve Tennessee educators and citizens in the state AEL Needs Assessment (NA) Conference and to develop a prioritized list of needs

6.0: To continue to provide technical assistance and consulting to the joint AEL/TN Regional Services short-term R & D project

7.0: To distribute copies of the RS Technical Papers both proactively and reactively

Tennessee State Consultant Plan - Rx

AEL-Rx Goal 1: To promote collaboration among dissemination and school improvement programs

TN-Rx Obj. 1.0: To conduct a minimum of two needs-sensing visits to Tennessee dissemination personnel

Tasks for Objective		Key Actors and Timeframe		Outcome and/or Product
1.1	Identify and/or verify key actors in Tennessee dissemination and school improvement	Sandy Orletsky	by 1/2/80	Names of key dissemination and school improvement personnel collected
1.2	Organize the first state consultant visit in TN	George Malo Jim Cannon Charley Moffett	by 1/7/80	Contacts made, schedule made, and accomodations arranged
1.3	Conduct the first state consultant visit in TN	George Malo Jim Cannon Charley Moffett	by 1/18/80	State visit completed, contacts and interviews made
1.4	Report on first state consultant visit to TN	Jack Sanders Sandy Orletsky	by 1/25/80	Meeting notes and/or memos regarding interviews with key personnel written and distributed
1.5	Respond to individual requests for collaboration help from TN personnel	Whomever calls or writes us	Whenever a request comes in	Timely responses made via telephone or by mail
1.6	Develop short-term plan or steps for next stage of AEL-TN collaboration	Merrill Meehan Jack Sanders Sandy Orletsky	by 2/18/80	Short-term AEL-TN collaboration plan
1.7	Communicate tentative AEL-TN collaboration plan to TN personnel	George Malo Jim Cannon Charley Moffett	by 2/25/80	AEL-TN collaboration plan mailed to TN personnel

Tennessee State Consultant Plan - Rx (Continued)

AEL-Rx Goal 1: (Continued)

TN-Rx Obj. 1.0: (Continued)

Tasks for Objective		Key Actors and Timeframe		Outcome and/or Product
1.8	Implement the AEL-TN collaboration plan	George Malo Jim Cannon Charley Moffett	ongoing	Collaboration plan steps taken
1.9	Collect information regarding TN's steps taken for the AEL-TN collaboration plan	George Malo Jim Cannon Charley Moffett	ongoing	Data recorded on transaction logs and/or letter file
1.10	Plan and organize the second state consultant visit to TN	Sandy Orletsky George Malo Jim Cannon Charley Moffett	by 3/31/81	Contacts made, schedule made, and accommodations arranged
1.11	Conduct the second state consultant visit to TN	George Malo Jim Cannon Charley Moffett	by 4/28/80	State visit completed, contacts and interviews made, state directory secured
1.12	Report on the second state consultant visit to TN	Jack Sanders Sandy Orletsky	by 5/12/80	Meeting notes and/or memos regarding interviews with key personnel written and distributed
1.13	Respond to individual requests for collaboration help from TN personnel	Whomever calls or writes us	Whenever a request comes in	Timely responses made via telephone or by mail

Tennessee State Consultant Plan - Rx (Continued)

AEL-Rx Goal 1: To promote collaboration among dissemination and school improvement programs

TN-Rx Obj. 2.0: To provide technical assistance and training in dissemination and school improvement efforts to Tennessee educators

Tasks for Objective		Key Actors and Timeframe		Outcome and/or Product
2.1	Accept invitation to speak at state capacity building grant advisory committee meeting	Charley Moffett	by 1/2/80	Name and suggested title of talk get on the meeting agenda
2.2	Address the TN state capacity building advisory committee meeting	TN state capacity building grant advisory committee	on 1/18/80	Advisory committee is made aware of AEL and its Rx services
2.3	Participate in advisory committee debriefing session(s)	George Malo Jim Cannon Charley Moffett	by 1/18/80	Reactions/perceptions of meeting provided to key personnel
2.4	Provide feedback and/or suggestions for improving Project Support slide-tape show	Charley Moffett	by 1/18/80	Suggestions for slide-tape show improvement given
2.5	Collect information for technical assistance and training desired by TN personnel	Whomever requests it	ongoing	Data recorded on transaction logs or in letter file
2.6	Sort and assess requests for technical assistance and training against needs-sensing data (see task 1.4)	Jack Sanders Sandy Orletsky George Malo	ongoing	Technical assistance and training needs for TN prioritized by AEL

Tennessee State Consultant Plan - Rx (Continued)

AEL-Rx Goal 1: (Continued)

TN-Rx Obj. 2.0: (Continued)

Tasks for Objective		Key Actors and Timeframe		Outcome and/or Product
2.7	Compare prioritized technical assistance and training needs with short-term collaboration plan	Sandy Orletsky	by 2/15/80 for 1st plan and ongoing after that	Technical assistance and training needs incorporated compared to short-term plan
2.8	Collect technical assistance and training needs continuously	Whomever calls/writes	ongoing	Data recorded on transaction logs or in letter file
2.9	Sponsor one person from TN to the National Dissemination Forum	Jim Cannon	by 5/21/80	NDF participant selected and notified
2.10	Sponsor AEL-Rx Advisory Committee member to March meeting	Jim Cannon	by 3/18/80	Input received at formal sessions, informal meetings yield other technical assistance needs and other relevant data

Tennessee State Consultant Plan - Rx (Continued)

AEL-Rx Goal 1: To promote collaboration among dissemination and school improvement programs

TN-Rx Obj. 3.0: To involve Tennessee personnel in the planning and conducting of at least one regional and one "job-alike" workshop

Tasks for Objective		Key Actors and Timeframe		Outcome and/or Product
3.1	Send and collect AEL-Rx workshop input form	Jim Cannon and Others	by 2/11/80	Workshop input forms received
3.2	Invite TN AEL-Rx Advisory Committee member to the meeting	Jim Cannon	by 2/25/80	Committee member's attendance plans recorded
3.3	Discuss workshop titles and times at Advisory Committee meeting	Jim Cannon	on 3/17/80	Workshop plans developed
3.4	Communicate AEL-Rx workshop plans to TN personnel	George Malo Jim Cannon Charley Moffett	by 4/28/80	Workshop dates and times transmitted to TN personnel
3.5	Invite TN personnel to first AEL-Rx regional workshop	George Malo Workshop Planners	by 4/28/80	Data recorded on transaction logs or in letter file
3.6	Collect information regarding TN's participation in AEL-Rx first regional workshop	Jim Cannon George Malo Workshop Planners	by 4/28/80	Data recorded on transaction logs or in letter file
3.7	Conduct first AEL-Rx regional workshop	Jim Cannon Charley Moffett Workshop Implementers	by 5/12/80	First regional workshop is conducted

Tennessee State Consultant Plan - Rx (Continued)

AEL-Rx Goal 1: (Continued)

TN-Rx Obj. 3.0: (Continued

Tasks for Objective		Key Actors and Timeframe		Outcome and/or Product
3.8	Record TN personnel's attendance and/or participation in the first regional workshop	Workshop Implementers	by 5/19/80	Data are obtained and recorded
3.9	Disseminate report from first regional workshop	Jim Cannon Whomever participated	by 6/2/80	Workshop reports mailed out
3.10	Repeat tasks 3.5 through 3.9 for second AEL-Rx workshop (first "job-alike" workshop)	Jim Cannon George Malo others	as is necessary	Same as for tasks 3.5 to 3.9

Tennessee State Consultant Plan - Rx (Continued)

AEL-Rx Goal 2: To promote the use of R & D solutions that support dissemination and school improvement efforts

TN-Rx Obj. 4.0: To explain and, where applicable, distribute resources which assist in dissemination and school improvement efforts

Tasks for Objective		Key Actors and Timeframe		Outcome and/or Product
4.1	Describe and discuss the AEL RRC to TN educators	George Malo Jim Cannon Charley Moffett others	ongoing	AEL-Rx's RRC described to various TN educators
4.2	Distribute and discuss AEL-Rx Bulletin	TN capacity building grant advisory committee	by 1/18/80	Bulletin copies distributed
4.3	Collect new Bulletin mailing list names in TN	TN capacity building grant advisory committee	by 1/18/80	New names on Bulletin mailing list
4.4	Distribute and discuss the Ed R & D Report	TN capacity building grant advisory committee	by 1/18/80	Ed R & D Report copies distributed
4.5	Collect new Ed R & D Report mailing list names in TN	TN capacity building grant advisory committee	by 1/18/80	New names on Ed R & D Report mailing list
4.6	Solicit R & D articles for publication in the Bulletin and the Ed R & D Report from TN educators	George Malo Bobby Woodruff Marilyn Slack others	by 3/31/80	One or two TN-written articles are published in our Bulletin
4.7	Arrange for TN educators to develop a printing quotation for the RWR-Math reports	Jim Cannon	by 2/22/80	RWR-Math reprinting quotes obtained

Tennessee State Consultant Plan - Rx (Continued)

AEL-Rx Goal 2: (Continued

TN-Rx Obj. 4.0: (Continued)

Tasks for Objectives		Key Actors and Timeframe		Outcome and/or Product
4.8	Discuss the number of extra RWR-Math reports TN needs	Jim Cannon	by 2/22/80	Data on RWR-Math needs recorded
4.9	Assist TN personnel in the development of a viable RWR-Math report plan	Jim Cannon Sandy Orletsky	by 3/31/80	RWR-Math report plan developed

Tennessee State Consultant Plan - RS

AEL-RS Goal 4: To annually conduct a needs assessment in individual member-states and to perform problem identification/clarification activities as a basis for jointly defining with SEAs regional services to be provided

TN-RS Obj. 5.0: To involve Tennessee educators and citizens in the AEL state Needs Assessment (NA) conference and to develop a prioritized list of needs

Tasks for Objectives		Key Actors and Timeframes		Outcome and/or Product
5.1	Inform key TN actors in the AEL Needs Assessment of it's general design and times	Howard McNeese George Malo	by 1/18/80	Key TN personnel informed of NA
5.2	Identify and describe AEL staff performing NA to TN personnel	Howard McNeese George Malo	by 1/18/80	TN staff know NA staff by name
5.3	Assist in the development of TN state NA conference participant list	George Malo Joe Shively	by 2/27/80	TN NA conference participants named
5.4	Distribute TN state NA conference agenda and participant list	Each participant and agency	by 4/14/80	TN NA conference agenda distributed
5.5	Conduct TN NA conference including lists of needs and priortizing these needs	TN NA participants Joe Shively Merrill Meehan	by 5/23/80	TN NA prioritized list of needs developed
5.6	Communicate results of TN NA conference to CSSO	Jack Sanders Joe Shively George Malo	by 5/30/80	TN CSSO receives list of prioritized needs from TN NA conference

Tennessee State Consultant Plan - RS (Continued)

AEL-RS Goal 4: To provide technical assistance to member-states in assisting them to carry out annually one high priority R & D project

TN-RS Obj. 6.0: To continue to provide technical assistance and consulting to the joint AEL/TN Regional Services short-term R & D project

Tasks for Objective		Key Actors and Timeframe		Outcome and/or Product
6.1	Meet with Bobby Woodruff during the state visit	Bobby Woodruff	by 1/18/80	Update on 8th grade test study provided
6.2	Sort information provided into needs to be given TN supervisors	George Malo	by 1/18/80	Provide TN supervisors with my perceptions of project needs
6.3	Search literature for relevant studies to give to TN personnel	Bobby Woodruff	ongoing	Send titles, copies, and/or references of studies similar to TN study to Bobby Woodruff
6.4	Respond to requests/aid desired by TN researchers	Bobby Wodruff	continuously	Requests and/or aid provided to the 8th grade test study
6.5	Solicit an article on the 8th grade test study by Woodruff for our Bulletin	Bobby Woodruff Marilyn Slack	for the late spring issue	An article on the 8th grade test study is published on the Bulletin

Tennessee State Consultant Plan - RS (Continued)

AEL-RS Goal 5: To disseminate the outcomes of RS accomplishments both regionally and nationally

TN-RS Obj. 7.0: To distribute copies of the RS Technical Papers both proactively and reactively

Tasks for Objective		Key Actors and Timeframe		Outcomes and/or Product
7.1	Develop a tentative list of RS Technical Paper #001 recipients	Sandy Orletsky	by 1/9/80	List prepared
7.2	Proactively distribute copies of RS Technical Paper #001 during first TN state visit	People on list	by 1/18/80	First set of technical papers distributed by hand
7.3	Discuss and "talk-up" the RS Technical Paper #002	People on #001 list	by 1/18/80	Second technical paper mentioned
7.4	Develop a tentative list of RS Technical Paper #002 recipients	Sandy Orletsky	As soon as it is received from printer	List prepared for RS Technical Paper #002
7.5	Proactively distribute copies of RS Technical Paper #002 by mail or in next state visit to TN	People on #002 list	By two weeks after it is received from the printer	First set of RS Technical Paper #002 distributed
7.6	Respond to individual requests for copies of the RS technical papers	Whomever writes or calls	Whenever they write or call	Requests fulfilled with response and/or information